

# Retention and Classification Report

**Agency:** Logan (Utah). Finance (2982)

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## **Records Officer**

22715	Budget working papers
22714	Daily cash report
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**AGENCY:** Logan (Utah). Finance

**SERIES:** 22715

3

**TITLE:** Budget working papers

**DATES:** 1999-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These files contain working papers used to assist in the preparation of municipal budgets and to justify budget requests presented to the city council. Includes departmental budget requests, work-up sheets, cost estimates, and rough data accumulated in the preparation of annual budget estimates, related correspondence, and documentation for approval of final budget.

**RETENTION:**

Retain 2 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 3, Item 9.

**AUTHORIZED:** 03/27/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then destroy.

**APPRAISAL:**

Administrative Fiscal

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22715

**TITLE:** Budget working papers

(continued)

**PRIMARY CLASSIFICATION:**

Public

**SECONDARY CLASSIFICATION(S):**

Private. UCA 63G-2-302(1)(f) (2008)

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22714

3

**TITLE:** Daily cash report

**DATES:** 1997-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 3.00 cubic feet.

**DESCRIPTION:**

These reports provide a daily record of cash balances, receipts, and disbursements.

**RETENTION:**

Retain 1 year in office and 2 years in agency records center.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 5, Item 10.

**AUTHORIZED:** 03/27/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 2 years and then destroy.

**APPRAISAL:**

Fiscal

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22714

**TITLE:** Daily cash report

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22717

3

**TITLE:** Merit employee performance-related records

**DATES:** 1998-

**ARRANGEMENT:** Alphabetical

**ANNUAL ACCUMULATION:**

**DESCRIPTION:**

These are performance-related records pertaining to summary performance appraisal, including appraisals and job element standards upon which they are based; and any supporting documentation.

**RETENTION:**

Retain 3 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 9, Item 27.

**AUTHORIZED:** 03/27/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after date of appraisal and then destroy.

**APPRAISAL:**

Administrative

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22717

**TITLE:** Merit employee performance-related records

(continued)

**PRIMARY CLASSIFICATION:**

Private

**SECONDARY CLASSIFICATION(S):**

Public. UCA 63G-2-301(1)(b) (2008)

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22713

3

**TITLE:** Receipt books

**DATES:**

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:**

**DESCRIPTION:**

These are receipts issued for money received into municipal accounts from all sources. Includes date of payment, department, or fund to which money belongs, receipt number and amount paid.

**RETENTION:**

Retain 2 months in the office and 34 months in the agency records center.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 5, Item 16.

**AUTHORIZED:** 03/27/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years and then destroy.

**APPRAISAL:**

Fiscal



**AGENCY:** Logan (Utah). Finance

**SERIES:** 22713

**TITLE:** Receipt books

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22716

3

**TITLE:** Routine control files

**DATES:** 1997-

**ARRANGEMENT:** Numerical

**ANNUAL ACCUMULATION:** 3.00 cubic feet.

**DESCRIPTION:**

These records are used to control work flow and to record routine actions. Includes job control records, status cards, routing slips, work processing sheets, correspondence forms, and receipts for records charged-out.

**RETENTION:**

Retain 2 years in office and 1 year in agency records center, authorized to destroyed after administrative need ends.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 1, Item 23.

**AUTHORIZED:** 03/27/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until no longer needed and then destroy.

**APPRAISAL:**

Administrative

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22716

**TITLE:** Routine control files

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22774

3

**TITLE:** Successful bid proposals

**DATES:** 1999-

**ARRANGEMENT:** Alphabetical by item, thereunder alphabetical by vendor

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These files contain the formal proposals submitted in response to the bidding process to provide products or services to a municipal agency by a private vendor which was awarded the municipal contract.

**RETENTION:**

Retain 4 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SG 13, Item 17.

**AUTHORIZED:** 08/24/2015

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

**APPRAISAL:**

Administrative

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22774

**TITLE:** Successful bid proposals

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22773

3

**TITLE:** Unsuccessful bid proposals

**DATES:** 1999-

**ARRANGEMENT:** Alphabetical by item, there under alphabetical by vendor

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These are solicited and unsolicited unsuccessful (rejected) bids and proposals to provide products or services to an agency by a private contractor.

**RETENTION:**

Retain 2 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule MUN 10, Item 11.

**AUTHORIZED:** 03/31/2000

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then destroy.

**APPRAISAL:**

Administrative

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22773

**TITLE:** Unsuccessful bid proposals

(continued)

**PRIMARY CLASSIFICATION:**

Public